



Amendments to Council Policy 100-02 (Donations Process)

Presentation to the Rules, Open Government,
Intergovernmental Relations Committee

Wednesday, July 27, 2011

Background

- Last amended on August 1, 1994
- Changing nature of giving
- Current Policy Outdated and not Donor Friendly
- Collaboration between City departments, agencies and commissions
- Anticipated Results:
 - Will improve customer service for donors
 - Improve accuracy, efficiency and transparency
 - Verify that donations meets City and departmental needs and is in City's best interest



Background

- **What's new in the amended policy**
 - Workable guide for City staff and donors
 - Existing: No general principles on parameters
 - Thorough and uniform evaluation process
 - Existing: No evaluation process included
 - Conformity with SDMC
 - Existing: Outdated language



Background

- **What's new in the amended policy (cont.)**
 - Reporting Rules for City Officials
 - Existing: No language on reporting
 - Clear and concise role definition between Mayor, Council and City Staff
 - Existing: No role definition included



Background

Main Objectives:

1. To establish and guide relationships with donors who share the City's commitment to provide a high quality civic environment;
2. To manage donations efficiently and responsibly;
3. To generate revenue to fund new and existing facilities, projects, programs and activities for the benefit of the City and its residents; and
4. To work with non-profits whose mission supports the City's strategic goals.



Background

- **Most common types of donations**
 - Monetary
 - In-kind services and equipment (i.e. playground equipment, benches, artwork, etc.)



Evaluation Process

- **Beneficiary Department Head evaluates donation based on:**

- 1.If the donation is consistent with all laws, policies, ordinances and resolutions applicable in the City
- 2.Has any special restrictions, and if so, if those restrictions are acceptable to the City
- 3.If it obligates the City to make an immediate or initial City expenditure which has not been included in the approved City budget; and
- 4.Creates a new, one-time or an on-going, annual general maintenance obligation for the City.



Policy

- **Donations valued at \$99,999 or less**
 - After an evaluation process, **Beneficiary Department Head** accepts donation if it's in the City's best interest
 - Will seek City Council approval if the donation requires expenditures in excess of the department's approved annual budget



Policy

- **Donations valued at \$100,000 to \$249,999**
 - After an evaluation process, **Mayor** accepts donation if it's in the City's best interest
 - Will seek City Council approval if the donation requires expenditures in excess of the department's approved annual budget (determined by beneficiary department head)



Policy

- **Donations valued at \$250,000 or more**
 - **City Council** action required
- After an evaluation process, City Council accepts donation if it's in the City's best interest





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